# II. E.E.M.A.

AREA I - SCANDINAVIA/FINLAND

DENMARK

FINLAND

ICELAND

NORWAY

SWEDEN

AREA II - EASTERN EUROPE

POLAND

TURKEY

U.S.S.R.

AREA III - MIDDLE EAST SOUTH

BAHRAIN

KUWAIT

OMAN

**QATAR** 

SAUDI ARABIA

UNITED ARAB EMIRATES (ABU DHABI, DUBAI)

ARFA IV - MIDDLE EAST WEST

**ALGERIA** 

EGYPT

LEBANON

MOROCCO

AREA V - AFRICA, WEST AFRICA, ZONE I

BENITO (BENIN, NIGER, TOGO)

EAST AND SOUTH AFRICA, ZONE I

DJIBOUTI

ETHTOPIA

ZONE III

SOUTH AFRICAN CUSTOMS UNION (BOTSWANA, LESOTHO, NAMIBIA, REPUBLIC OF SOUTH

AFRICA, SWAZILAND)

CENTRAL AFRICA

NIGERIA

AREA VI - SWITZERLAND

SWITZERLAND

NAME OF MARKET: DENMARK

|   | 1978               | 1979               | 1980                | 1981               | 1982               |
|---|--------------------|--------------------|---------------------|--------------------|--------------------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS)                                | 7.4                | 7.4                | 7.2                 | 7.3                | 8.0                |
| PER CAPITA OVER 15 YRS  | 1897               | 1897               | 1846                | 1872               | N.A.               |
| COMPANY SHARES 1) SKANDINAVISK TOB. 2) PHILIP MORRIS 3) NORDISK TOBAK | 98.4<br>0.9<br>0.7 | 98.7<br>0.8<br>0.5 | 98.9<br>0.6<br>0.15 | 98.9<br>0.6<br>0.5 | 98.9<br>0.6<br>0.5 |

| (DENMARK)             | ,         |              | 1978           | 1979 | 1980 | 1981        | 1982 |
|-----------------------|-----------|--------------|----------------|------|------|-------------|------|
| BRAND SHARES %        |           |              |                |      |      |             |      |
|                       | TRADEMARK |              |                |      |      |             |      |
| BRAND NAME            | OWNERSHIP | MANUFACTURER |                |      |      |             |      |
| 1) PRINCE F           |           | STC          | 42.2           | 36.9 | 36.0 | 35.7        | 34.6 |
| 2) CECIL NF           |           | STC          | 23.8           | 22.7 | 22.0 | 21.7        | 21.2 |
| 3) LOOK F             |           | STC          | 7.7            | 8.3  | 9.8  | 10.3        | 11.1 |
| 4) PRINCE LIGHT F     |           | STC          | -              | 5.5  | 5.2  | <b>5.</b> 6 | 6.6  |
| 5) LOOK MENTHOL       |           | STC          | 3.0            | 3.6  | 4.2  | 4.2         | 4.5  |
| 6) KINGS NF           |           | STC          | 4.6            | 4.2  | 4.2  | 4.3         | 4.4  |
| 7) LOOK LIGHT         |           | STC          | 1.3            | 3.0  | 3.2  | 3.6         | 4.3  |
| 8) SCOTSMAN BLUE NF   |           | STC          | <b>3.</b> 5    | 3.3  | 3.4  | 3.4         | 3.6  |
| 9) VIKING NF          |           | STC          | 2.9            | 3.0  | 3.2  | 2.9         | 2.6  |
| 10) NORTH ST. BLUE NE | ק         | STC          | 1.6            | 1.5  | 1.6  | 1.4         | 1.3  |
| MARKET SEGMENTATION%  |           |              |                |      |      |             |      |
| FILTER                |           |              | 64.7           | 65.3 | 65.6 | 66.3        | 66.9 |
| NON-FILTER            |           |              | 35.3           | 34.7 | 34.4 | 33.7        | 34.1 |
| PRICE SEGMENTATION    |           |              |                |      |      |             |      |
| HIGH                  |           |              |                |      |      | 1.7         | 1.8  |
| MEDIUM                |           |              | COMP STATE AND | ·    | **** | 93.3        | 92.9 |
| LOW                   |           |              | ****           |      |      | 5.0         | 5.3  |
| LENGIH SEGMENTATION 8 | ŧ         |              |                |      |      |             |      |
| 70 MM AND SHORTER     | •         |              |                | 5.2  | 5.2  | 5.1         | 5.3  |
| 80 MM TO 85 MM        |           |              |                | 18.4 | 20.6 | 21.5        | 22.2 |
| 100 MM                |           |              |                | 76.4 | 74.2 | 73.4        | 72.5 |
|                       |           |              |                | ·    |      |             |      |

### NAME OF MARKET: FINLAND

|  | 1978                               | 1979                               | 1980                               | 1981                               | 1982                               |
|--|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS)   | 6.6                                | 6.9                                | 7.0                                | 6.6                                | 6.9                                |
| PER CAPITA CONSUMPTION   | 1754                               | 1827                               | 1843                               | 1714                               | N.A.                               |
| COMPANY SHARES  1) PHILIP MORRIS (AMER-TUPAKKA)  2) RETTIG-STRENGBERG  3) SUOMEN-TUPAKKA (BAT)  4) AMER-TUPAKKA  5) OTHERS | 41.6<br>25.4<br>24.5<br>7.4<br>1.1 | 42.1<br>24.5<br>24.9<br>7.5<br>1.0 | 44.4<br>24.8<br>22.8<br>7.2<br>0.8 | 44.8<br>24.4<br>23.3<br>6.6<br>0.9 | 47.3<br>23.7<br>21.8<br>6.5<br>0.7 |

| (FINLAND)                   |           | 1978              | 1979 | 1980 | 1981 | 1982  |
|-----------------------------|-----------|-------------------|------|------|------|-------|
| BRAND SHARES %              |           |                   |      |      |      |       |
| TRADEMARK                   |           |                   |      |      |      |       |
| BRAND NAME OWNERSHIP        |           |                   | 24.6 | 24.0 | 20.4 | 20. 7 |
| 1)MARLBORO                  | P. MORRIS | *******           | 34.6 | 34.2 | 32.4 | 30.7  |
| 2) NORTH STATE F            | ST.       |                   | 21.2 | 18.0 | 17.7 | 16.8  |
| 3) COLT IS F                | RS.       |                   | 13.6 | 11.3 | 11.2 | 10.4  |
| 4) MARLBORO LIGHTS          | P. MORRIS | date large little | 1.9  | 4.0  | 4.7  | 5.7   |
| 5) BELMONT EXTRA MILD       | P. MORRIS |                   | 0.4  | 1.1  | 2.6  | 5.4   |
| 6)LIGHT 5                   | RS.       |                   | 1.1  | 4.5  | 3.7  | 4.3   |
| 7) BELMONT MULTIFILTER      | P. MORRIS |                   | 1.3  | 1.6  | 1.9  | 2.4   |
| 8) FORM SPECIAL             | AT.       | 9-40 temp temp    | 2.6  | 2.8  | 2.3  | 2.4   |
| 9) MARLBORO MENTHOL         | P. MORRIS | 00 tm 640         | 2.6  | 2.3  | 2.3  | . 2.2 |
| 10) ARMIRO MILD             | RS.       |                   | 2.6  | 2.7  | 2.5  | 2.0   |
| MARKET SEGMENTATION%        |           |                   |      |      |      |       |
| FILTER                      |           | 97.4              | 97.6 | 98.1 | 98.2 | 98.5  |
| NON-FILITER                 |           | 2.6               | 2.4  | 1.9  | 1.8  | 1.5   |
| TAR & NICOTINE SEGMENTATION |           |                   |      |      |      |       |
| LOW 0-5 MG                  |           | -                 | 1.1  | 7.4  | 7.8  | 9.7   |
| MEDIUM 6-12 MG              |           | 14.8              | 15.2 | 17.2 | 19.4 | 22.8  |
| HIGH/FULL FLAVOR            |           | 85.2              | 83.7 | 75.4 | 72.8 | 67.5  |
| LENGTH SEGMENTATION %       |           |                   |      |      |      |       |
| 70 MM AND SHORTER           | •         | 34.4              | 33.2 | 27.8 | 27.1 | 24.1  |
| 75 MM - 80 MM               |           | 63.8              | 65.1 | 71.0 | 71.6 | 74.8  |
| 85 MM                       |           | 1.8               | 1.7  | 1.2  | 1.3  | 1.1   |

| NAME OF MARKET: ICELAND  |                       |                  | •                          |                            |                            |                            |
|--|-----------------------|------------------|----------------------------|----------------------------|----------------------------|----------------------------|
|  |                       | 1978             | 1979                       | 1980                       | 1981                       | 1982                       |
| TOTAL CIGARETTE CONSUMPTION  | (BILLIONS)            | 0.37             | 0.37                       | 0.38                       | 0.40                       | 0.42                       |
| PER CAPITA CONSUMPTION   |                       | 1682             | 1610                       | 1650                       | 1740                       | 1826                       |
| COMPANY SHARES 1) R.J. REYNOLDS 2) BROWN & WILLIAMSON (B&W) 3) PHILIP MORRIS 4) OTHERS |                       |                  | 69.5<br>25.9<br>3.6<br>1.0 | 70.1<br>23.6<br>4.7<br>1.6 | 71.6<br>20.4<br>6.4<br>1.6 | 72.8<br>17.3<br>8.2<br>1.7 |
| BRAND SHARES % TRADEMARK BRAND NAME OWNERSHIP  | MANUFACTURER          |                  |                            |                            |                            |                            |
| 1) WINSTON KS  | REYNOLDS              |                  | 32.6<br>9.2                | 32.6<br>10.9               | 31.6<br>13.1               | 31.7<br>14.2               |
| 2)WINSTON LIGHTS KS<br>3)CAMEL RS NF   | REYNOLDS<br>REYNOLDS  |                  | 9.2<br>18.4                | 16.3                       | 14.6                       | 13.3                       |
| 4) VICEROY KS  | BROWN & WILLIAMSON    | Sect desir dates | 17.7                       | 15.7                       | 12.9                       | 11.0                       |
| 5) SALEM LIGHTS KS   | REYNOLDS              |                  | 1.6                        | 2.9                        | 4.0                        | 5.2                        |
| 6)MALRBORO KS<br>7)SALEM KS MENTHOL  | P. MORRIS<br>REYNOLDS |                  | 3.0<br>3.6                 | 3.6<br>3.5                 | 4.3<br>3.3                 | 5.0<br>3.3                 |
| 8) KENT KS   | BROWN & WILLIAMSON    |                  | 3.6                        | 3.5<br>3.5                 | 3.3                        | 2.3                        |
| 9)MARLBORO LIGHTS  | P. MORRIS             |                  | <b></b>                    | 0.5                        | 1.2                        | 2.1                        |
| 10) VICEROY LIGHTS   | BROWN & WILLIAMSON    | -                | 1.0                        | 1.6                        | 1.8                        | 1.4                        |
| 11) OTHERS   |                       | -                | 9.3                        | 8.9                        | 9.9                        | 10.5                       |
| MARKET SEGMENTATION %  |                       |                  |                            | <b>70.0</b>                | 00.5                       | 30 3                       |
| FILTER   |                       | Own News area    | 77.6                       | 79.9                       | 83.7                       | N.A.                       |
| NON-FILTER   |                       |                  | 22.4                       | 20.1                       | 16.3                       | N.A.                       |

## NAME OF MARKET: NORWAY

|  |   | 1978   | 1979   | 1980   | 1981   | 1982   |
|--|---|--|--|--|--|--|
| TOTAL CIGARETTE CONSUMPTION (  | (BILLIONS)  | 1.9  | 2.0  | 2.2  | 2.0  | 1.7  |
| PER CAPITA OVER 15YRS  |   | 602  | 657  | 713  | 632  | 536  |
| COMPANY SHARES 1)B.A.T. 2)SKANDINAVISK TOBACCO CO. ( 3)PHILIP MORRIS 4)TIEDEMANN 5)TEI (ROTHMANS) 6)REYNOLDS 7)LANGAARD 8)OTHERS | (STC)   | 30.3<br>16.0<br>12.7<br>19.2<br>8.5<br>8.2<br>4.8<br>0.3 | 31.0<br>16.5<br>14.7<br>16.7<br>9.5<br>6.8<br>4.0<br>0.8               | 28.5<br>18.4<br>15.9<br>14.8<br>11.2<br>6.6<br>3.8<br>0.8            | 27.5<br>19.8<br>16.7<br>13.7<br>11.5<br>6.8<br>3.2<br>0.8            | 27.8<br>21.2<br>16.9<br>12.2<br>11.3<br>6.6<br>3.3<br>0.8            |
| BRAND SHARES % TRADEMARK   |   | 1  |  |  |  |  |
|  | MANUFACTURER STC P. MORRIS B.A.T. B.A.T. STC B.A.T. TEI TIEDEMANN TIEDEMANN P. MORRIS |  | 13.2<br>11.0<br>11.1<br>10.2<br>3.3<br>5.2<br>3.8<br>5.2<br>4.0<br>2.5 | 13.4<br>11.7<br>9.9<br>9.6<br>5.0<br>5.5<br>4.2<br>4.7<br>3.4<br>2.5 | 13.6<br>12.0<br>9.0<br>9.0<br>6.2<br>5.6<br>4.2<br>4.5<br>3.8<br>2.5 | 14.0<br>12.2<br>8.6<br>8.4<br>7.2<br>5.5<br>4.2<br>3.9<br>2.5<br>2.5 |

| (NORWAY) BRAND SHARES %   |   | 1978         | 1979                                   | 1980  | 1981                                   | 1982                                   |
|---|---|--------------|--|---|--|--|
| TRADEMARK BRAND NAME OWNERSHIP  | MANUFACTURER  |              |  |   |  |  |
| 11) COOLY 12) WINSTON 13) ROTHMANS KS 14) PALL MALL EXTRA MILD 15) SALEM 16) TEDDY NF 17) PETTERE KSF | LANGAARD REYNOLDS TEI B.A.T. REYNOLDS TIEDEMANN TIEDEMANN |              | 3.6<br>2.7<br>2.8<br>1.0<br>3.0<br>2.6 | 3.3<br>2.9<br>2.5<br>1.5<br>2.5<br>2.8<br>1.5 | 2.9<br>2.8<br>2.5<br>1.7<br>3.3<br>2.1 | 2.5<br>2.5<br>2.4<br>2.4<br>2.4<br>1.9 |
| 18) BENSON & HEDGES 19) KENT 20) MARLBORO LIGHTS OTHERS   | B.A.T.<br>TIEDEMANN<br>P. MORRIS                          |              | 1.3<br>1.0<br>0.5                      | 1.0<br>1.0<br>0.7<br>10.4                     | 1.0<br>1.0<br>0.8<br>10.0              | 1.3<br>1.1<br>0.8<br>11.8              |
| MARKET SEGMENTATION % FILTER NON-FILTER   |   | 79.4<br>20.6 | 80.0<br>20.0                           | 81.4<br>18.6                                  | 82.7<br>17.3                           | 84.7<br>15.3                           |

CIGARETTE ADVERTISING MEDIA AVAILABILITY

\*NOTATIONS: 1) YES

2) BANNED

3) RESTRICTED

- A) TELEVISION
- B) RADIO
- C) NEWSPAPERS
- D) MAGAZINES
- E) COUPONS
- F) POINT OF SALE
- G) BILLBOARDS
- H) CINEMA
- I) SAMPLING

NO CIGARETTE ADVERTISING PERMITTED.

# NAME OF MARKET: SWEDEN

| •  | 1978         | 1979 | 1980 | 1981   | 1982 |
|--|--------------|------|------|--------|------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS)       | 11.7         | 11.9 | 11.9 | 11.5   | 12.0 |
| TOTAL CIGARNITE CONSUMETION (DILLICION)      | 11.7         | 11.7 | **** | TT • 7 | 12.0 |
| PER CAPITA OVER 15YRS                        | 1795         | 1784 | 1784 | 1712   | 1773 |
| COMPANIA CITA DISC                           |              |      |      |        |      |
| COMPANY SHARES  1) SWEDISH TOBACCO CO. (STA) | 87.3         | 87.3 | 87.6 | 87.7   | 87.4 |
| 2) PHILIP MORRIS                             | 9.4          | 9.6  | 9.5  | 9.5    | 9.7  |
| 3)B.A.T. (INCL. LORILLARD)                   | 2.6          | 2.4  | 2.2  | 2.0    | 2.0  |
| 4) R.J. REYNOLDS                             | 0.4          | 0.4  | 0.4  | 0.5    | 0.5  |
| 5) OTHERS                                    | 0.3          | 0.3  | 0.3  | 0.3    | 0.4  |
| BRAND SHARES %                               |              |      |      |        |      |
| TRADEMARK                                    |              |      |      |        |      |
| BRAND NAME OWNERSHIP MANUFACTURER            |              |      |      |        |      |
| 1) PRINCE F STA                              | 24.4         | 18.3 | 18.3 | 18.2   | 18.5 |
| 2) BLEND F STA                               | 12.1         | 11.8 | 12.2 | 12.7   | 13.9 |
| 3) PRINCE LIGHTS STA                         |              | 6.9  | 7.3  | 8.0    | 9.1  |
| 4) BLEND EXTRA STA                           | 7.3          | 7.4  | 5.5  | 6.2    | 5.7  |
| 5) JOHN SILVER F STA                         | 5.2          | 4.4  | 4.3  | 4.4    | 4.5  |
| 6) COMMERCE F STA                            | 7 <b>.</b> 5 | 6.1  | 6.0  | 4.7    | 4.3  |
| 7) MARLBORO P. MORRIS                        | 3.3          | 4.1  | 4.3  | 4.0    | 4.2  |
| 8) GLENN F STA                               | 6.4          | 5.6  | 5.4  | 5.0    | 4.2  |
| 9) BLEND ULTRA STA                           |              | 2.5  | 5.8  | 5.1    | 3.9  |
| 10) RIGHT F STA                              |              | 1.7  | 2.1  | 3.1    | 3.6  |

| (SWEDEN)                    | ,            | 1978 | 1979        | 1980 | 1981 | 1982 |
|-----------------------------|--------------|------|-------------|------|------|------|
| BRAND SHARES %              |              |      |             |      |      |      |
| TRADEMARK                   |              |      |             |      |      |      |
| BRAND NAME OWNERSHIP        | MANUFACTURER |      |             |      |      |      |
| 11) BLEND MENTHOL           | STA          | 3.9  | 4.1         | 4.1  | 3.6  | 3.6  |
| 12) COMMERCE NF             | STA          | 5.0  | 4.2         | 4.1  | 3.9  | 3.6  |
| 13) JOHN SILVER REG.        | STA          | 5.1  | 4.7         | 4.3  | 3.9  | 3.6  |
| 14) HOBSON F                | STA          | 3.2  | 2.6         | 2.5  | 2.4  | 2.1  |
| 15) BOND STREET F           | P. MORRIS    | 3.2  | 2.7         | 2.6  | 2.0  | 1.8  |
| 16) BLEND ULTRA MENTHOL     | STA          | -    |             |      | 1.4  | 1.5  |
| 17)BOND LTN                 | P. MORRIS    | 1.2  | 1.5         | 1.6  | 1.5  | 1.4  |
| 18)COMMERCE LIGHTS          | STA          |      |             | 0.6  | 1.4  | 1.2  |
| 19) MINDEN MENTHOL          | STA          | 1.3  | 1.3         | 1.1  | 0.9  | 1.0  |
| 20) NEW LOOK F              | B.A.T.       | 0.9  | 0.8         | 1.0  | 0.8  | 0.8  |
| OTHERS                      | •            | 10.0 | 9.3         | 6.9  | 6.8  | 7.5  |
| MARKET SEGMENTATION %       |              |      |             |      |      |      |
| FILTER                      |              | 87.2 | 88.9        | 89.4 | 90.3 | 90.8 |
| NON-FILTER                  |              | 12.8 | 11.1        | 10.6 | 9.7  | 9.2  |
| PRICE SEGMENTATION          |              |      |             |      | 44.0 | 45 7 |
| HIGH                        |              |      |             |      | 44.0 | 45.7 |
| LOW                         |              |      | <del></del> |      | 56.0 | 54.3 |
| TAR & NICOTINE SEGMENTATION | 1 8          |      |             |      |      |      |
| LOW (0-8)                   |              | 7.3  | 9.9         | 12.3 | 12.0 | 11.2 |
| MEDIUM (9-14)               |              | 18.2 | 23.4        | 24.8 | 26.7 | 30.4 |
| HIGH/FULL FLAVOR (ABOVE 14  | 1)           | 74.5 | 66.7        | 62.9 | 61.3 | 58.4 |

# NAME OF MARKET: POLAND

|                              |             |                             | 1978               | 1979 | 1980 | 1981 | 1982 |
|------------------------------|-------------|-----------------------------|--------------------|------|------|------|------|
| TOTAL CIGARETTE (            | CONSUMPTION | (BILLIONS)                  | 91.4               | 93.0 | 93.4 | 89.5 | 92.0 |
| PER CAPITA CONSUL            | APTION      |                             | 2611               | 2638 | 2625 | 2493 | N.A. |
| BRAND FAMILY SHAP            | TRADEMARK   | MANUTERA (MILITARIA)        |                    |      |      |      |      |
| BRAND NAME                   | OWNERSHIP   | MANUFACTURER LUBLIN FACTORY |                    | 55.4 | 53.5 | 57.0 | 58.0 |
| 1) POPULARNE<br>2) KLUBOWE F |             | LUBLIN FACTORY              |                    | 25.3 | 28.6 | 24.7 | 23.7 |
| 3) CARMEN F                  |             | LUBLIN FACTORY              |                    | 1.7  | 1.6  | 3.0  | 3.0  |
| 4) EKSTRA MOCNE 1            | 7           | LUBLIN FACTORY              |                    | 1.7  | 2.0  | 3.0  | 3.0  |
| 5) GIEWONT F                 | •           | LUBLIN FACTORY              | -                  | 1.9  | 1.8  | 2.9  | 2.9  |
| 6) RADOMSKIE                 |             | LUBLIN FACTORY              | ****               | 4.0  | 3.4  | 1.9  | 1.9  |
| 7) ORIENT                    |             | LUBLIN FACTORY              |                    | 1.0  | 1.0  | 1.8  | 1.8  |
| 8) CARO F                    |             | LUBLIN FACTORY              |                    | 2.4  | 1.6  | 1.6  | 1.6  |
| 9) MARLBORO/LIC.             |             | KRAKOW FACTORY              |                    | 2.0  | 2.0  | 0.7  | 0.2  |
| 10) ZEFIR F                  |             | LUBLIN FACTORY              | Short State (Miles | 0.7  | 0.8  | 0.8  | 0.8  |
| MARKET SEGMENTAT             | ION %       |                             |                    |      |      |      |      |
| FILTER                       |             |                             | 40.9               | 45.3 | 47.5 | 40.0 | 45.0 |
| NON-FILTER                   |             |                             | 59.1               | 54.7 | 52.5 | 60.0 | 55.0 |

#### NAME OF MARKET: TURKEY

|                                  | 197             | 78 1           | .979          | 1980          | 1981        | 1982 |
|----------------------------------|-----------------|----------------|---------------|---------------|-------------|------|
| TOTAL CIGARETTE CONSUMPTION (BII | ILLIONS) 56.    | .9 6           | 57 <b>.</b> 9 | 70.4          | 74.7        | 78.0 |
| PER CAPITA CONSUMPTION           | 132             | 20 1           | .536          | L567          | <b>1611</b> | N.A. |
| BRAND SHARES % TRADEMARK         |                 |                |               |               |             |      |
|                                  | NUFACTURER      |                |               |               |             |      |
| 1) MALTEPE F                     | graph bears the | - 1            | .0.2          | 14.2          | 18.8        | 44.3 |
| 2) SAMSUN F                      |                 | <del>-</del> 5 | 51.8          | 43.8          |             | 27.9 |
| 3)BIRINCI NF                     | and the col     | - 1            | .5.1          | 17 <b>.</b> 5 | 21.1        | 17.3 |
| 4) BAFRA NF                      | gard (see ) ph  | - 1            | .6.9          | 16.8          | 9.0         | 7.9  |
| MARKET SEGMENTATION %            |                 |                |               |               |             |      |
| FILTER                           | 59.             | .6 6           | 55.7          | 65.6          | 69.4        | 73.8 |
| NON-FILTER                       | 40.             | .4 3           | 34.3          | 34.4          | 30.6        | 26.2 |

#### CIGARETTE ADVERTISING MEDIA AVAILABILITY

\*NOTATIONS: 1) YES

- 2) BANNED
- 3) RESTRICTED
- A) TELEVISION
- B) RADIO
- C) NEWSPAPERS
- D) MAGAZINES
- E) COUPONS
- F) POINT OF SALE
- G) BILLBOARDS
- H) CINEMA
- I) SAMPLING

ALL CIGARETTE ADVERTISING IS PROHIBITED, EXCEPT IN FOREIGN LANGUAGE PUBLICATIONS AND IN SOME DUTY FREE OUTLETS.

### NAME OF MARKET: U.S.S.R.

|  | 1978     | 1979     | 1980     | 1981     | 1982         |
|--|----------|----------|----------|----------|--------------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS)           | 455      | 433      | 435      | 438      | 426          |
| PER CAPITA OVER 15YRS                            | 2449     | 2330     | 2637     | 2724     | N.A.         |
| MARKET SEGMENTATION % FILTER NON-FILTER          | 28<br>72 | 28<br>72 | 32<br>68 | 33<br>67 | 32<br>68     |
| LENGIH SEGMENTATION %<br>80 MM to 85 MM<br>100MM |          |          |          |          | 85.0<br>15.0 |
| OVER 100 MM                                      |          |          |          |          |              |

#### CIGARETTE ADVERTISING MEDIA AVAILABILITY

\*NOTATIONS: 1) YES

- 2) BANNED
- 3) RESTRICTED
- A) TELEVISION
- B) RADIO
- C) NEWSPAPERS
- D) MAGAZINES
- E) COUPONS
- F) POINT OF SALE
- G) BILLBOARDS
- H) CINEMA
- I) SAMPLING

NO ADVERTISING IS PERMITTED.

| NAME OF MARKET: BAHRAIN         |                        |              |              |             |              |      |
|---------------------------------|------------------------|--------------|--------------|-------------|--------------|------|
|                                 |                        | 1978         | 1979         | 1980        | 1981         | 1982 |
| TOTAL CIGARETTE CONSUMPTION     | (BILLIONS)             | 0.6          | 0.6          | 0.6         | 0.6          | 0.6  |
| PER CAPITA CONSUMPTION          |                        | 1765         | 1935         | 1667        | 1875         | N.A. |
| IMPORT SHARES                   |                        | <b>60. 4</b> | <b>7</b> 4 F | <b>50.0</b> | 72 A         | 77.6 |
| 1) UNITED KINGDOM IMPORTS       |                        | 68.4         | 71.5         | 70.2        | 73.4         | 77.6 |
| 2) PHILIP MORRIS                |                        | 9.1          | 9.6          | 9.3         | 9.8          | 9.2  |
| 3) OTHER U.S. IMPORTS           |                        | 15.8         | 12.9         | 12.4        | 12.4         | 10.8 |
| 4) OTHER IMPORTS                |                        | 6.7          | 6.0          | 8.1         | 4.4          | 2.4  |
| BRAND FAMILY SHARES % TRADEMARK | MARKET IN CALLE IN THE |              |              |             |              |      |
| BRAND NAME OWNERSHIP            | MANUFACTURER           | 23.8         | 26.2         | 23.7        | 19.3         | 22.4 |
| 1) ROTHMANS                     | TEI<br>TEI             | 23.8<br>17.2 | 20.2         | 20.7        | 20.3         | 20.6 |
| 2) DUNHILL                      | LAURENS                | 17.2         | 20.3         | 2.5         | 9.7          | 9.5  |
| 3) JUBILEE                      | P. MORRIS              | 9.1          | 8.8          | 2.5<br>8.7  | 9.0          | 8.2  |
| 4) MARLBORO                     | B.A.T.                 | 0.2          | 0.5          | 1.0         | 3.0          | 6.7  |
| 5) PLAYERS GOLD LEAF            | BROWN & WILLIAMSON     | 10.8         | 9.3          | 8.0         | 8.0          | 6.7  |
| 6) KENT                         |                        | 2.2          | 3.2          | 4.3         | 5 <b>.</b> 0 | 5.1  |
| 7) SILK CUT<br>8) 555           | GALLAHER<br>B.A.T.     | 11.4         | 7.8          | 4.5<br>4.5  | 5.0<br>5.3   | 4.7  |
| •                               |                        | 4.9          | 4.7          | 4.8         | 5.8          | 3.2  |
| 9) BENSON & HEDGES              | B.A.T.                 | 5.6          | 4.6          | 3.5         | 2.3          | 2.0  |
| 10) CRAVEN A                    | TEI<br>R.J. REYNOLDS   | 1.6          | 1.9          | 2.7         | 2.5<br>2.5   | 2.0  |
| 11)WINSTON                      | R.J. REINOLDS          | 13.2         | 12.7         | 15.6        | 9 <b>.</b> 8 | 8.9  |
| OTHERS                          |                        | 13.2         | 12.7         | 12.0        | 9.0          | 0.9  |
| MARKET SEGMENTATION %           |                        |              |              |             |              |      |
| FILTER                          |                        | 99.0         | 99.0         | 99.0        | 99.0         | 99.0 |
| NON-FILTER                      |                        | 1.0          | 1.0          | 1.0         | 1.0          | 1.0  |
| IACIA-L TTTEK                   |                        | 1.0          | Τ•0          | T*O         | T.0          | Τ•0  |

|   |             |  |   |   |   | -   |   |
|---|-------------|--|---|---|---|---|---|
| NAME OF MARKET: I   | KUWAIT      |  |   |   |   |   |   |
|   |             |  | 1978  | 1979  | 1980  | 1981  | 1982  |
| TOTAL CIGARETTE O   | CONSUMPTION | (BILLIONS)   | 3.17  | 3.47  | 3.35  | 2.73  | 3.05  |
| PER CAPITA CONSUM   | APTION .    |  | 2620  | 2690  | 2445  | 2007  | 2276  |
| COMPANY SHARES 1) PHILIP MORRIS 2) TEI 3) BROWN & WILLIZ 4) B.A.T. 5) R. J. REYNOLDS 6) GALLAHER 7) OTHERS  | •           | ARD  | 38.5<br>33.9<br>10.7<br>6.4<br>4.5<br>1.3<br>4.7  | 37.2<br>39.5<br>8.2<br>5.8<br>4.9<br>1.2<br>3.2 | 37.3<br>40.9<br>6.5<br>5.7<br>4.5<br>1.3<br>3.8   | 39.2<br>39.9<br>6.5<br>4.2<br>3.7<br>1.5  | 38.2<br>37.8<br>7.6<br>7.5<br>3.3<br>1.7  |
| BRAND FAMILY SHAI   | TRADEMARK   | MANT IN A CAUTINETO  |   |   |   |   |   |
| BRAND NAME 1) MARLBORO 2) ROTHMANS 3) CRAVEN A 4) KENT 5) DUNHILL 6) PLAYERS GOLD I 7) WINSTON 8) VICEROY 9) DU MAURIER 10) SILK CUT 11) L&M 12) 555 13) BENSON & HEDGIOTHERS | ES          | MANUFACTURER P. MORRIS TEI TEI LORILLARD TEI B.A.T. R.J. REYNOLDS BROWN & WILLIAMSON B.A.T. GALLAHER P. MORRIS B.A.T. B.A.T. | 36.3<br>21.2<br>9.5<br>10.6<br>3.2<br><br>4.5<br><br>3.8<br>1.3<br>1.7<br>1.8<br>0.8<br>5.3 | 35.1<br>26.7<br>8.8<br>8.2<br>3.6<br>           | 35.4<br>27.7<br>7.9<br>6.4<br>5.1<br><br>4.0<br>0.1<br>3.0<br>1.3<br>1.4<br>1.2<br>0.7<br>5.8 | 37.1<br>26.2<br>6.6<br>6.3<br>6.3<br><br>3.5<br>0.2<br>2.1<br>1.5<br>1.5<br>1.1<br>0.8<br>6.8 | 36.2<br>24.9<br>5.8<br>5.6<br>5.0<br>3.5<br>2.8<br>1.8<br>1.6<br>1.5<br>1.4<br>0.8<br>7.3 |
| MARKET SECMENTAT<br>FILTER<br>NON-FILTER  | ION %       |  | 99.0<br>1.0   | 99.0<br>1.0                                     | 99.0<br>1.0   | 99.0<br>1.0   | 99.0<br>1.0   |

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| NAVE OF MARKET: OMAN  |   |   |   |  |  |  |
|---|---|---|---|--|--|--|
|   |   | 1978  | 1979  | 1980   | 1981   | 1982   |
| TOTAL CIGARETTE CONSUMPTION   | (BILLIONS)  | 0.9   | 0.9   | 1.0  | 1.1  | 1.2  |
| PEP CAPITA CONSUMPTION  |   | 1071  | 1047  | 1124   | 1196   | N.A.   |
| IMPORT SHARES 1) PHILIP MORRIS 2) OTHER U.S. IMPORTS 3) UNITED KINGDOM IMPORTS 4) OTHERS  |   | 5.9<br>10.3<br>77.6<br>6.2  | 9.0<br>7.0<br>72.0<br>12.0  | 6.6<br>7.2<br>74.0<br>12.2   | 7.2<br>4.8<br>69.6<br>18.4   | 5.7<br>3.9<br>75.8<br>14.6   |
| BPAND FAMILY SHARES %   |   |   |   |  |  |  |
| TRADEMARK BRAND NAME OWNERSHIP 1) ROTHMANS 2) PLAYERS GOLD LEAF 3) DUNHILL 4) WILLS 5) STATE EXPRESS 6) MARLBORO 7) BENSON & HEDGES 8) KENT 9) WINSTON 10) CRAVEN A 11) SILK CUT 12) CAPSTAN OTHERS | MANUFACTURER TEI B.A.T. TEI ITC/B.A.T. B.A.T. P. MORRIS B.A.T. BROWN & WILLIAMSON REYNOLDS TEI GALLAHER PAKT/B.A.T. | 40.5<br>8.4<br><br>13.5<br>5.9<br>2.2<br>4.5<br>3.4<br>10.1<br><br>11.5 | 40.8<br>12.1<br>0.8<br><br>6.8<br>9.0<br>2.1<br>4.0<br>2.0<br>6.3<br><br>16.1 | 42.0<br>15.6<br>1.9<br>4.6<br>5.9<br>6.6<br>2.3<br>3.4<br>1.7<br>2.8<br>0.5<br>0.9<br>11.8 | 34.4<br>18.5<br>5.9<br>6.2<br>4.6<br>7.2<br>2.0<br>2.9<br>1.6<br>1.4<br>1.1<br>2.1 | 32.0<br>21.5<br>6.5<br>6.3<br>5.9<br>5.6<br>2.9<br>2.0<br>1.1<br>1.1<br>1.1<br>1.0 |
| MARKET SECMENTATION % FILTER NON-FILTER   |   | 99.0<br>1.0   | 99.0<br>1.0   | 99.0<br>1.0  | 99.0<br>1.0  | 99.0<br>1.0  |

|  |  |  | •   |  |   |   |
|--|--|--|---|--|---|---|
| NON-FILTER<br>FILTER<br>WYRKET SEGMENTATION\$  |  | 0.99<br>0.1  | 0°T<br>0°66   | 0°τ<br>0°66                                    | 0°T<br>0°66   | 0°T<br>0°66   |
| 10) MINSLON 3) SII'K COL 4) DINHLIT 5) SIVATE EXPRESS 555 6) KENT 7) BENSON & HEDGES 3) MARIBORO 2) PLAYERS COLD LEAF 3) MARIBORO 4) DUNHILL 5) PLAYERS COLD LEAF 6) KENT 7) PCHAMANS 8) ROMERSHIP 10) WINSLON BRAND NAME BR | MANUFACTURER TEI B.A.T. TEI B.A.T. B&W B&W TEI TEI TEI TEI TEI TEI TEI TEI TEI | 2.24<br>7.21<br>2.3<br>2.5<br>2.5<br>2.5<br>2.5<br>2.5 | 9°7<br>1°7<br>0°3<br>0°8<br>0°5<br>6°5<br>7<br>7<br>8°6<br>8°7<br>9°7 | Z*#<br>9*Z<br>8*9<br>L*6<br>9*8<br>Z*I<br>6*I# | 8°E<br>9°I<br>9°S<br>1°9<br>0°OI<br>7°II<br>8°E<br>1°S† | 2.14<br>2.4<br>2.4<br>2.4<br>2.4<br>2.4<br>2.4<br>2.4<br>2.4<br>2.4<br>2. |
| BRAND FAMILY SHARES %  |  |  |   |  |   |   |
| IMPORT SHARES 2) OTHERS U.S. IMPORTS 4) OTHERS   | ·  | 2.07<br>7.21<br>8.81<br>8.8                            | 2°07<br>5°51<br>8°5<br>8°5  | T*8<br>S*IT<br>8*8<br>9*TL                     | S°₹<br>T°6<br>E°TT<br>T°S/                              | 0.08<br>6.6<br>5.8<br>5.8   |
| PER CAPITA CONSUMPTION   |  | 7,381  | 7774  | 7,500  | 7,400   | •A•N  |
| LAMPT CICEMENTE CONSUMPTION (BILL  | (SNOI  | <b>9</b> *0  | <b>5</b> •0   | 9 <b>°</b> 0                                   | 9*0   | ۷*0   |
|  |  | 8791   | 646T  | 086T   | T86T  | T985  |
| NAME OF MARKET: OFIAR  |  |  |   |  |   |   |

## NAME OF MARKET: SAUDI ARABIA

|  | 1978                        | 1979                       | 1980                               | 1981                               | 1982                              |
|--|-----------------------------|----------------------------|------------------------------------|------------------------------------|-----------------------------------|
| TOTAL CIGAPETTE CONSUMPTION (BILLIONS)   | 8.5                         | 9.7                        | 11.4                               | 12.3                               | 13.0                              |
| PER CAPITA CONSUMPTION   | 1,029                       | 1,127                      | 1,272                              | 1,320                              | N.A.                              |
| COMPANY SHARES 1)TEI 2)PHILIP MORRIS 3)B.A.T. 4)BROWN & WILLIAMSON/LORILLARD 5)ST. PAULS | 52.1<br>23.9<br>8.6<br>10.1 | 51.9<br>23.8<br>9.5<br>9.9 | 47.3<br>27.0<br>10.0<br>8.8<br>0.2 | 43.9<br>27.7<br>11.4<br>6.8<br>3.2 | 43.8<br>29.1<br>9.5<br>4.8<br>4.4 |
| 6)R.J. REYNOLDS  | 4.0                         | 3.9<br>0.4                 | 3.5<br>0.4                         | 4.5<br>0.5                         | 4.0<br>0.6                        |
| 7)GALLAHER<br>8)LAURENS<br>9)OTHERS  | 1.3                         | 0.4                        | 2.2<br>0.6                         | 1.6<br>0.4                         | 0.2<br>3.6                        |

| (SAUDI ARABIA)        |              | 1978  | 1979         | 1980 | 1981 | 1982 |
|-----------------------|--------------|-------|--------------|------|------|------|
| BRAND FAMILY SHARES % |              |       |              |      |      |      |
| TRADEMARK             |              |       |              |      |      |      |
| BRAND NAME OWNERSHIP  | MANUFACTURER | 20. 4 | 27.0         | 24.2 | 22 7 | 22.0 |
| 1) ROTHMANS KS/INT    | TEI          | 39.4  | 37.9         | 34.2 | 32.7 | 33.9 |
| 2) MARLBORO           | P. MORRIS    | 23.2  | 23.4         | 26.5 | 26.9 | 27.3 |
| 3) PLAYERS GOLD LEAF  | B.A.T.       | 3.9   | 3.7          | 3.6  | 5.1  | 5.1  |
| 4) LONDON             | ST. PAULS    |       |              | 0.2  | 3.2  | 4.4  |
| 5) KENT               | LORILLARD    | 10.1  | 9.2          | 8.1  | 6.0  | 4.2  |
| 6) CRAVEN A           | TEI          | 9.6   | 8.1          | 6.6  | 4.9  | 3.7  |
| 7) DUNHILL KS/INT.    | TEI          | 3.1   | 4.2          | 5.0  | 4.5  | 3.5  |
| 8) BENSON & HEDGES    | B.A.T.       | 2.7   | 3.0          | 3.7  | 4.8  | 2.9  |
| 9) WINSTON            | REYNOLDS     | 4.0   | 3 <b>.</b> 6 | 3.1  | 3.0  | 2.7  |
| 10) 555               |              | 1.9   | 0.9          | 1.0  | 1.0  | 1.2  |
| •                     | B.A.T.       |       |              |      |      |      |
| 11) MERIT             | P. MORRIS    | 0.1   | 0.3          | 0.5  | 0.7  | 1.1  |
| 12)JUBILEE            | LAURENS      |       |              | 2.2  | 1.6  | 0.2  |
| OTHERS                |              | 2.0   | 5.7          | 5.3  | 5.6  | 9.8  |
| MARKET SEGMENTATION % |              |       |              |      |      |      |
| FILTER                |              | 99.0  | 99.0         | 99.0 | 99.0 | 99.0 |
| NON FILTER            |              | 1.0   | 1.0          | 1.0  | 1.0  | 1.0  |

### NAME OF MARKET: UNITED ARAB EMIRATES

|  | 1978 | 1979             | 1980  | 1981  | 1982 |
|--|------|------------------|-------|-------|------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS) |      | enne david divid | 2.8   | 2.9   | 3.0  |
| PER CAPITA CONSUMPTION                 | -    |                  | 3,795 | 3,789 | N.A. |
| COMPANY SHARES                         |      |                  |       |       |      |
| 1) PHILIP MORRIS                       |      |                  | 11.2  | 10.3  | 10.7 |
| 2) BROWN & WILLIAMSON/LORILLARD        |      |                  | 4.3   | 3.2   | 3.2  |
| 3) R.J. REYNOLDS                       |      |                  | 2.4   | 2.7   | 2.5  |
| 4) OTHER U.S.                          |      |                  | 0.7   | 0.5   | 0.8  |
| 5) TEI                                 |      |                  | 48.2  | 46.0  | 44.4 |
| 6) B.A.T. (EXCL. ITC/BAT & PAKT/BAT)   |      |                  | 16.2  | 20.1  | 25.1 |
| 7) LAURENS                             |      | ****             | 1.3   | 2.9   | 0.9  |
| 8) GALLAHER                            |      |                  | 2.1   | 2.4   | 2.5  |
| 9) OTHER U.K.                          |      |                  | 0.3   | 0.6   | 0.6  |
| 10) OTHERS                             |      | <del></del>      | 13.3  | 11.3  | 9.3  |

| (UNITED ARAB EMIRATES) |               | 1978          | 1979            | 1980 | 1981 | 1982 |
|------------------------|---------------|---------------|-----------------|------|------|------|
| BRAND FAMILY SHARES %  |               |               |                 |      | ,    |      |
| TRADEMARK              |               |               |                 |      |      |      |
| BRAND NAME OWNERSHIP   | MANUFACTURER  |               |                 |      |      |      |
| 1) ROTHMANS            | TEI           |               |                 | 33.8 | 31.7 | 28.2 |
| 2) PLAYERS GOLD LEAF   | B.A.T.        |               |                 | 8.7  | 9.5  | 13.2 |
| 3) DUNHILL             | TEI           |               |                 | 12.7 | 12.3 | 12.4 |
| 4) MARLBORO            | P. MORRIS     | 400 Sept Sept | 64 65 64        | 10.9 | 9.9  | 10.3 |
| 5) BENSON & HEDGES     | B.A.T.        | PD 2775 N/2   |                 | 4.5  | 5.7  | 5.8  |
| 6) STATE EXPRESS 555   | B.A.T.        |               |                 | 3.0  | 4.9  | 5.7  |
| 7) KENT                | LORILLARD     |               |                 | 4.3  | 3.2  | 2.9  |
| 8) SILK CUT            | GALLAHER      |               | and 200 500     | 2.1  | 2.3  | 2.4  |
| 9)WILLS                | ITC/BAT       |               |                 | 2.2  | 2.6  | 2.4  |
| 10) WINSTON            | R.J. REYNOLDS |               | the first first | 2.4  | 2.7  | 2.3  |
| 11) CRAVEN A           | TEI           |               |                 | 1.7  | 2.0  | 1.9  |
| 12) CAPSTAN            | PAKT/BAT      |               |                 | 1.9  | 2.5  | 1.7  |
| MARKET SEGMENTATION %  |               |               |                 |      |      |      |
| FILTER                 |               |               |                 | 99.0 | 99.0 | 99.0 |
| NON-FILTER             |               |               |                 | 1.0  | 1.0  | 1.0  |

## NAME OF MARKET: ALGERIA

|   | 1978             | 1979  | 1980 | 1981                 | 1982                 |
|---|------------------|-------|------|----------------------|----------------------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS)  | 11.5             | 12.5  | 13.5 | 14.5                 | 15.5                 |
| PER CAPITA CONSUMPTION  | 654              | 687   | 723  | 740                  | 767                  |
| BRAND FAMILY SHARES % TRADEMARK BRAND NAME OWNERSHIP MANUFACTURER 1) AFRAS F SNTA 2) HOGGAR 25G SNTA 3) SAFY F SNTA |                  | ·<br> |      | 32.5<br>27.6<br>20.2 | 32.5<br>28.6<br>19.2 |
| 4) ILHEM 25G SNTA<br>5) OTHERS  | come bases drove |       |      | 9.2<br>10.5          | 10.2<br>9.5          |
| TOBACCO TYPE SEGMENTATION % LOCAL BLOND LOCAL BLACK AMERICAN/VIRGINIA   |                  |       |      | 38.5<br>55.8<br>3.6  | 41.5<br>53.5<br>3.0  |
| OTHERS  |                  | ***   |      | 2.1                  | 2.0                  |

## NAME OF MARKET: EGYPT

|  | 1978       | 1979        | 1980        | 1981        | 1982        |
|--|------------|-------------|-------------|-------------|-------------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS) | 30.6       | 32.1        | 33.8        | 36.4        | 38.1        |
| PER CAPITA CONSUMPTION                 | 769        | 783         | 801         | 837         | 866         |
| COMPANY SHARES 1) EASTERN              | 92.3       | 72.6        | 73.7        | 73.6        | 72.1        |
| 2) EL NASR<br>3) TEI                   | 2.8        | 20.7<br>3.0 | 20.5<br>2.9 | 20.4<br>2.6 | 20.0<br>3.3 |
| 4) PHILIP MORRIS 5) BROWN & WILLIAMSON | 1.8<br>1.1 | 1.9<br>0.8  | 1.7<br>0.8  | 2.3<br>0.7  | 3.2<br>1.0  |
| 6) B.A.T.<br>7) OTHERS                 | 0.8<br>1.2 | 0.5<br>0.5  | 0.3<br>0.1  | 0.3<br>0.1  | 0.3<br>0.1  |

| (EGYPT)          |             |                    | 1978  | 1979  | 1980 | 1981 | 1982 |
|------------------|-------------|--------------------|-------|-------|------|------|------|
| BRAND FAMILY SHA | ARES %      |                    |       |       |      |      |      |
|                  | TRADEMARK   |                    |       |       |      |      |      |
| BRAND NAME       | OWNERSHIP   | MANUFACTURER       |       |       |      |      |      |
| 1) CLEOPATRA     |             | EASTERN            |       | 64.8  | 65.0 | 66.0 | 67.0 |
| 2) NEFERTITI     |             | EL NASR            |       | 9.3   | 10.4 | 11.0 | 12.0 |
| 3) FLORIDA       |             | EL NASR            |       | 7.5   | 7.1  | 7.0  | 6.8  |
| 4) MARLBORO      |             | P. MORRIS          |       | 1.9   | 1.6  | 2.2  | 3.0  |
| 5) BELMONT       |             | EASTERN            |       | 3.0   | 3.0  | 3.0  | 2.7  |
| 6) ROTHMANS      |             | TEI                |       | 2.8   | 2.4  | 2.1  | 2.6  |
| 7) KENT          |             | BROWN & WILLIAMSON |       | 0.8   | 0.8  | 0.7  | 1.0  |
| MARKET SEGMENTAT | CION &      |                    |       |       |      |      |      |
| FILTER           |             |                    | 96.3  | 97.2  | 98.1 | 99.1 | 99.2 |
| NON-FILTER       |             |                    | 3.7   | 2.8   | 1.9  | 0.9  | 0.8  |
| TAR & NICOTINE   | SEGMENTATIO | N %                |       |       |      |      |      |
| LOW              |             |                    |       |       | 0.1  | 0.3  | 0.4  |
| HIGH/FULL FLAVO  | OR .        |                    | 100.0 | 100.0 | 99.9 | 99.7 | 99.6 |

### NAME OF MARKET: LEBANON

| 1978 1979 1980 1981 1982   |
|--|
|  |
| 4.6 5.1 5.2 5.3 5.4  |
| 1710 1917 1955 1970 1740   |
| 68.0 67.0 67.0 66.0 66.0<br>10.0 12.0 13.0 13.0 15.0<br>9.0 10.0 10.0 10.0 8.0<br>10.0 8.0 7.0 6.0 6.0<br>3.0 3.0 3.0 5.0 5.0  |
|  |
| S     68.0     65.0     64.0     64.0     64.0       10.0     12.0     13.0     13.0     15.0       9.0     10.0     10.0     10.0     8.0       ACS     2.0     1.0     2.0     4.0     4.0       5.0     4.0     3.0     3.0     3.0 |
| 68.0 67.0 67.0 66.0 66.1 67.0 10.0 12.0 13.0 13.0 13.0 10.0 10.0 10.0 10.0 10  |

| (LEBANON)   | 1978         | 1979        | 1980         | 1981            | 1982        |
|---|--------------|-------------|--------------|-----------------|-------------|
| MARKET SEGMENTATION% FILTER NON-FILTER  | 98.0<br>2.0  | 98.0<br>2.0 | 99.0<br>1.0  | 99.0<br>1.0     | 99.0<br>1.0 |
| TAR & NICOTINE SEGMENTATION% LOW HIGH/FULL FLAVOR                                   | 100.0        | 2.0<br>98.0 | 5.0<br>95.0  | 7.0<br>93.0     | 7.0<br>93.0 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY *NOTATIONS: 1) YES 2) BANNED 3) RESTRICTED |              |             |              |                 |             |
| A) TELEVISION   | 1            | 1           | 1            | 1               | 1           |
| B) RADIO  |              |             | ****         |                 |             |
| C) NEWSPAPERS   |              |             |              |                 |             |
| D) MAGAZINES  |              |             |              |                 |             |
| E) COUPONS  |              |             |              |                 | (ma) (ma)   |
| F) POINT OF SALE  | Care size ma | ****        | South Street | dara upro della |             |
| G) BILLBOARDS   | <br>1        | 1           | 1            | 1               | 1           |
| H) CINEMA   | T            | T           | Т            | <b></b>         |             |
| I) SAMPLING   |              |             |              | <del></del>     |             |

# NAME OF MARKET: MOROCCO

|  | 1978            | 1979         | 1980 | 1981 | 1982 |
|--|-----------------|--------------|------|------|------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS) | 11.2            | 11.7         | 12.2 | 12.2 | 12.1 |
| PER CAPITA CONSUMPTION                 | 592             | 601          | 608  | 591  | N.A. |
| COMPANY SHARES OF TOTAL MARKET         |                 |              |      |      |      |
| 1) REGIE DES TABACS                    |                 | 92.6         | 91.4 | 88.8 | 91.8 |
| 2) PHILIP MORRIS                       |                 | 4.4          | 4.8  | 5.9  | 3.5  |
| 3) R.J. REYNOLDS                       |                 | 1.1          | 2.0  | 3.6  | 3.3  |
| 4) BROWN & WILLIAMSON                  |                 | 0.7          | 0.7  | 0.8  | 0.5  |
| 5) OTHERS                              | inité data data | 1.2          | 1.1  | 0.9  | 0.9  |
| COMPANY SHARES OF TOTAL IMPORTS        |                 |              |      |      | •    |
| 1) PHILIP MORRIS                       |                 | 59.2         | 55.7 | 52.3 | 42.9 |
| 2) R.J. REYNOLDS                       |                 | <b>14.</b> 7 | 24.1 | 32.6 | 40.3 |
| 3) BROWN & WILLIAMSON                  | 000 GE          | 10.2         | 8.5  | 7.0  | 6.7  |
| 4) OTHERS                              | speed facility  | 15.9         | 11.7 | 8.1  | 10.1 |

| (MOROCCO)   |                   |   | 1978         | 1979                              | 1980                               | 1981                               | 1982                              |
|---|-------------------|---|--------------|-----------------------------------|------------------------------------|------------------------------------|-----------------------------------|
| BRAND FAMILY SHA  | TRADEMARK         | RTS   |              |                                   |                                    |                                    |                                   |
| BRAND NAME 1) MARLBORO 2) WINSTON 3) KENT 4) CAMEL 5) L&M                                   | OWNERSHIP         | MANUFACTURER P. MORRIS R.J. REYNOLDS BROWN & WILLIAMSON R.J. REYNOLDS P. MORRIS |              | 57.5<br>6.6<br>10.2<br>6.5<br>1.7 | 54.5<br>11.2<br>8.0<br>12.1<br>1.2 | 50.4<br>20.0<br>7.0<br>11.6<br>0.7 | 42.2<br>36.7<br>5.7<br>3.5<br>0.7 |
| MARKET SEGMENTAT<br>FILTER<br>NON-FILTER  | TON %             |   | 46.1<br>53.9 | 46.3<br>53.7                      | 46.5<br>53.5                       | 48.1<br>51.9                       | 53.3<br>46.7                      |
|   | ) YES<br>) BANNED |   |              |                                   |                                    |                                    |                                   |
| A) TELEVISION B) RADIO C) NEWSPAPERS D) MAGAZINES E) COUPONS F) POINT OF SALE G) BILLBOARDS |                   | -<br>-  | 1 1          | 1 1 1 1                           | 1 1 1 1                            | 1 1                                | 1 1                               |
| H) CINEMA I) SAMPLING   |                   |   | T            |                                   | .1.                                |                                    |                                   |

### NAME OF MARKET: BENITO

|   | 1978 | 1979         | 1980 | 1981 | 1982   |
|---|------|--------------|------|------|--------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS)                              | 1.6  | 3 <b>.</b> 5 | 5.0  | 8.0  | 10.0   |
| PER CAPITA CONSUMPTION  | 148  | 319          | 440  | 683  | . N.A. |
| BRAND FAMILY SHARES %  TRADEMARK  BRAND NAME OWNERSHIP MANUFACIURER |      |              |      |      |        |
| 1) BENSON & HEDGES B.A.T.   |      |              |      | 60.0 | 57.0   |
| 2) ST. MORITZ TEI   |      |              |      | 17.0 | 33.0   |
| 3) ROTHMANS KS TEI  |      |              | -    | 10.0 |        |
| 4) MARLBORO PM  |      |              | -    | 8.0  | 8.0    |
| 5) OTHERS   |      |              |      | 5.0  | 2.0    |

# NAME OF MARKET: DJI BOUTI

|  | 1978 | 1979         | 1980         | 1981         | 1982         |
|--|------|--------------|--------------|--------------|--------------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS) | 0.3  | 0.3          | 0.3          | 0.3          | 0.3          |
| PER CAPITA CONSUMPTION                 | 1154 | 1071         | 968          | 882          | N.A.         |
| COMPANY SHARES                         |      |              |              |              |              |
| 1) TEI<br>2) SEITA                     |      | 68.2<br>15.0 | 58.0<br>13.4 | 61.2<br>13.1 | 60.5<br>12.0 |
| 3) PHILIP MORRIS 4) LAURENS            |      |              | 9.3          | 10.0<br>5.5  | 10.7<br>6.5  |
| 5) BAT                                 |      | 6.0          | 5.7          | 4.9          | 5.0          |
| 6) R. J. REYNOLDS                      |      | 1.9          | 0.3          | 0.9          | N.A.         |
| 7) B & W                               |      | 0.3          | 0.3          | 0.3          | N.A.         |
| 8) OTHERS                              |      | 8.6          | 13.0         | 4.1          | N.A.         |

| (DJI BOUTI)   | 1978   | 1979               | 1980                    | 1981                           | 1982                                    |
|---|--|--------------------|-------------------------|--------------------------------|---|
| BRAND FAMILY SHARES % TRADEMARE   | ;  |                    |                         |                                |   |
| BRAND NAME OWNERSHIE  1) CRAVEN A  2) MARLBORO  3) PETER STUYVESANT  4) JUBILEE  5) GITANES/GAULOISES  6) BLACK CAT | MANUFACTURER TEI P. MORRIS TEI LAURENS SEITA TEI | 59.6<br><br>15.0   | 54.1<br>9.2<br><br>13.4 | 55.0<br>9.8<br><br>5.5<br>13.1 | 42.0<br>9.8<br>9.0<br>6.5<br>6.0<br>6.0 |
| 7) FINE KS 8) BENSON & HEDGES 9) ROTHMANS 10) OTHERS  | SEITA<br>B.A.T.<br>TEI                           | 6.0<br>6.0<br>13.4 | 5.7<br>2.9<br>14.7      | 0.9<br>4.9<br>3.1<br>7.7       | 6.0<br>5.0<br>3.5<br>6.2                |
| MARKET SEGMENTATION% FILTER   |  | dia ana ana        | 100.0                   | 100.0                          | 100.0                                   |

NAME OF MARKET: ETHIOPIA

|  | ,  |                                    |                                   |   |   |                                   |
|--|--|------------------------------------|-----------------------------------|---|---|-----------------------------------|
|  |  | 1978                               | 1979                              | 1980                                    | 1981                                    | 1982                              |
| TOTAL CIGARETTE CONSUMPTION  | (BILLIONS)                               | 1.4                                | 1.7                               | 1.8                                     | 2.0                                     | 2.2                               |
| PEP CAPITA CONSUMPTION 15 YRS AND OVER   |  | 47                                 | 56                                | 58                                      | 62                                      | 67                                |
| COMPANY SHARES 1) NIMC 2) R.J. REYNOLDS 3) TEI (ROTHMANS) 4) BROWN & WILLIAMSON (B.A. 5) PHILIP MORRIS 6) B.A.T. | т.)                                      | 81.9<br>11.6<br>2.6<br>2.5<br>1.4  | 83.0<br>8.7<br>5.8<br>1.9<br>0.6  | 81.7<br>9.1<br>6.2<br>1.7<br>1.0<br>0.3 | 81.3<br>9.4<br>5.6<br>2.2<br>0.9<br>0.6 | 84.7<br>8.4<br>5.5<br>1.1<br>0.3  |
| BRAND FAMILY SHARES % TRADEMARK BRAND NAME OWNERSHIP 1)NYALA 2)GISILLA NF 3)WINSTON 4)ROTHMANS 5)GUREZA          | MANUFACTURER NTMC NTMC REYNOLDS TEI NTMC | 38.7<br>35.5<br>11.6<br>2.6<br>7.7 | 42.1<br>33.9<br>8.4<br>5.6<br>7.0 | 38.4<br>32.5<br>9.1<br>6.0<br>6.0       | 39.9<br>34.1<br>9.4<br>5.4<br>4.1       | 40.5<br>36.0<br>8.4<br>5.5<br>7.7 |
| 6)IDEAL<br>7)KENT<br>8)MARLBORO<br>9)OTHERS  | NIMC<br>BROWN & WILLIAMSON<br>P. MORRIS  | 2.5<br>0.7<br>0.7                  | 1.9<br>0.6<br>0.5                 | 4.2<br>1.5<br>1.0<br>1.3                | 3.1<br>2.1<br>0.9<br>1.0                | 1.1<br>0.3<br>0.5                 |

| NAME OF MARKET: | SOUTH APRICAN CUSTOMS UNION             |
|-----------------|---|
|                 | (REP. OF SOUTH AFRICA, LESOTHO, NAMIBIA |
|                 | BOTSWANA, SWAZILAND)                    |

| BOTSWANA, SV   | VAZILAND)           |                     |                     |                     |                     |                     |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
|  |                     | 1978                | 1979                | 1980                | 1981                | 1982                |
| TOTAL CIGARETTE CONSUMPTION  | (BILLIONS)          | 24.8                | 25.6                | 28.5                | 30.6                | 32.2                |
| POPULATION TOTAL (MILLIONS)  |                     | 795                 | 798                 | 864                 | 902                 | N.A.                |
| COMPANY SHARES 1) REMBRANDT (ROTHMANS) 2) UNITED TOBACCO CO. (B.A.7 3) IMPORTS | r.)                 | 79.0<br>20.0<br>1.0 | 80.0<br>19.0<br>1.0 | 81.0<br>18.0<br>1.0 | 84.0<br>15.0<br>1.0 | 84.0<br>14.0<br>2.0 |
| BRAND FAMILY SHARES % TRADEMARK  |                     |                     |                     |                     |                     |                     |
| BRAND NAME OWNERSHIP   | MANUFACTURER        |                     |                     |                     |                     |                     |
| 1) LEXINGION   | REMBRANDT           | 21.0                | 22.6                | N.A.                | 20.0                | 17.0                |
| 2) ROTHMANS  | REMBRANDT           | 16.2                | 16.3                | N.A.                | 15.0                | 13.0                |
| 3) PETER STUYVESANT  | REMBRANDT           | 7.9                 | 8.1                 | N.A.                | 8.5                 | 10.0                |
| 4) CHESTERFIELD  | REMBRANDT (LIC)     | 3.0                 | 4.2                 | 5.6                 | 7.4                 | 7.8                 |
| 5) GUNSTON   | REMBRANDT           | 5.7                 | 5.9                 | N.A.                | 6.0                 | 5.4                 |
| 6) VAN RIJN F  | REMBRANDT           | 6.3                 | 5.9                 | N.A.                | 5.0                 | N.A.                |
| 7) GOLD DOLLAR F   | U.T.C.              | 4.8                 | 3.9                 | N.A.                | 3.5                 | N.A.                |
| 8) DUNHILL   | REMBRANDT           | 3.5                 | 3.0                 | N.A.                | 2.5<br>2.5          | N.A.<br>N.A.        |
| 9) BENSON & HEDGES<br>10) PAUL REVERS  | U.T.C.<br>REMBRANDT | 3.2<br>1.4          | 2.7<br>1.5          | N.A.<br>N.A.        | 2.4                 | N.A.                |
| 11) OTHERS   | LTATIOL/AINI) I     | 27.0                | 25.9                | N.A.                | 27.2                | N.A.                |

| (SOUTH AFRICAN CUSTOMS UNION)   | 1978            | 1979         | 1980         | 1981                | 1982                |
|---|-----------------|--------------|--------------|---------------------|---------------------|
| MARKET SEGMENTATION % FILTER NON-FILTER   | 95.0<br>5.0     | 96.0<br>4.0  | 96.0<br>4.0  | 96.0<br>4.0         | 97.0<br>3.0         |
| TAR & NICOTINE SEGMENTATION %<br>LOW<br>HIGH/FULL FLAVOR                            | <br>100.0       | 11.0<br>89.0 | 11.0<br>89.0 | 12.0<br>88.0        | 13.0<br>87.0        |
| TOBACCO TYPE SEGMENTATION % BLENDED VIRGINIA  | 45.2<br>54.8    | 45.0<br>55.0 | 45.5<br>54.5 | 46.0<br>54.0        | N.A.<br>N.A.        |
| PACK COUNT SEGMENTATION % UP TO 10 CIGIS/PACK 20 CIGIS/PACK 30 CIGIS/PACK           |                 | <br>         |              | 4.0<br>77.0<br>19.0 | 3.7<br>76.1<br>20.2 |
| CIGARETTE ADVERTIŚING MEDIA AVAILABILITY *NOTATIONS: 1) YES 2) BANNED 3) RESTRICTED |                 |              |              |                     |                     |
| A) TELEVISION B) RADIO C) NEWSPAPERS D) MAGAZINES E) COUPONS F) POINT OF SALE       | 1<br>1<br>1<br> | 1 1          | 1<br>1<br>   | 1 1                 | 1 1                 |
| G) BILLBOARDS<br>H) CINEMA<br>I) SAMPLING   | 1               | 1            | 1            | 1                   | 1                   |

## NAME OF MARKET: NIGERIA

|  |              | 1978                | 1979         | 1980         | 1981         | 1982         |
|--|--------------|---------------------|--------------|--------------|--------------|--------------|
| TOTAL CIGARETTE CONSUMPTION  | (BILLIONS)   | 11.8                | 11.3         | 11.0         | 9.9          | 8.5          |
| PER CAPITA CONSUMPTION   |              | 163                 | 151          | 143          | 124          | N.A.         |
| COMPANY SHARES 1) NIGERIA TOBACCO COMPANY ( 2) PHILIP MORRIS NIGERIA (PM |              |                     | 82.9<br>17.1 | 83.1<br>16.9 | 83.9<br>16.1 | 84.2<br>15.8 |
| BRAND SHARES % TRADEMARK   |              |                     |              |              |              |              |
| BRAND NAME OWNERSHIP   | MANUFACTURER |                     |              |              |              |              |
| 1) THREE RINGS F   | NTC          | dend spent being    | 21.9         | 22.2         | 22.6         | 27.5         |
| 2) LINK FILTER   | PMN          |                     | 9.2          | 9.8          | 9.4          | 9.7          |
| 3) HIGH SOCIETY F  | NIC          |                     | 6.1          | 7.3          | 9.3          | 9.4          |
| 4) WILL'S MARS F   | NTC          |                     | 8.4          | 8.5          | 8.1          | 9.4          |
| 5) PLAYER'S GOLD LEAF BOX  | NIC          | <b>مدر مدر</b> -    | 18.4         | 15.5         | 10.1         | 8.8          |
| 6) SWEET MENTHOL BOX   | NIC          |                     | 9.2          | 9.8          | 9.6          | 7.2          |
| 7) BENSON & HEDGES   | NIC          | desire desire forms | 5.9          | 6.2          | 8.9          | 7.0          |
| 8) SWEET MENTHOL SOFT  | NTC          |                     | 6.9          | 6.2          | 7.3          | 7.0          |
| 9) THREE RINGS PLAIN   | NTC          |                     | 4.1          | 3.9          | 4.9          | 5.1          |
| 10) GREEN SPOT   | PMN          |                     | 2.3          | 2.8          | 2.4          | 2.6          |
| 11)TARGET F  | PMN          |                     | 4.1          | 3.0          | 2.8          | 2.3          |
| 12) OTHERS   |              | Paris State STR-    | <b>3.</b> 5  | 4.8          | 4.6          | 4.0          |

| (NIGERIA)             |      |      |      |      |      |
|-----------------------|------|------|------|------|------|
| MARKET SEGMENTATION % |      |      |      |      |      |
| FILTER                | 92.0 | 94.0 | 95.0 | 95.0 | 95.0 |
| NON-FILTER            | 8.0  | 6.0  | 5.0  | 5.0  | 5.0  |
| PRICE SEGMENTATION    |      |      |      |      |      |
| PREMIUM (\$.90)       |      | 6.7  | 7.0  | 9.9  | 8.0  |
| HIGH (\$.60)          |      | 18.7 | 15.8 | 10.3 | 9.6  |
| MEDIUM (\$.53-\$.57)  |      | 21.4 | 21.6 | 22.3 | 19.1 |
| LOW (\$.38)           |      | 53.2 | 55.6 | 57.5 | 63.3 |

### NAME OF MARKET: SWITZERLAND

|  |           |  | 1978   | 1979  | 1980   | 1981  | .1982   |
|--|-----------|--|--|---|--|---|---|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS)   |           | 15.3   | 15.0   | 15.4  | 15.7   | 16.0  |   |
| POPULATION OVER 15 YR OF AGE (MILLIONS)  |           | 3,019  | 2,960  | 3,025   | 3,096  | N.A.  |   |
| COMPANY SHARES 1) PHILIP MORRIS 2) BURRUS 3) B.A.T. 4) RINSOZ & ORMOND 5) LAURENS 6) REYNOLDS 7) REETSMA 8) IMPERIAL                               |           |  | 30.3<br>28.5<br>19.1<br>10.2<br>7.1<br>2.2<br>2.1<br>0.5       | 31.3<br>29.2<br>18.5<br>9.6<br>6.8<br>2.4<br>1.8<br>0.4               | 32.5<br>28.2<br>18.3<br>8.9<br>6.9<br>2.9<br>2.0                             | 34.3<br>27.3<br>18.0<br>8.3<br>6.7<br>3.4<br>1.7<br>0.3               | 34.7<br>26.3<br>18.6<br>7.6<br>6.5<br>4.1<br>1.8<br>0.4               |
| BRAND FAMILY SHARES %  | TRADEMARK |  |  |   |  |   |   |
| BRAND NAME  1) MARLBORO  2) SELECT  3) PARISIENNE  4) MARYLONG  5) MURATTI  6) BRUNEITE  7) GAULOISES  8) MAROCAINE  9) CAMEL  10) DUNHILL  11) HB | OWNERSHIP | MANUFACTURER P. MORRIS (FTR) BURRUS BURRUS B.A.T. P. MORRIS (FTR) P. MORRIS (FTR) R & O B.A.T. REYNOLDS LAURENS B.A.T. | 10.7<br>13.1<br>12.5<br>9.9<br>7.1<br>8.5<br>8.5<br>3.7<br>1.7 | 11.3<br>14.0<br>12.3<br>9.8<br>7.6<br>8.5<br>7.9<br>3.9<br>1.9<br>1.9 | 12.8<br>13.7<br>12.0<br>9.6<br>7.9<br>8.2<br>7.2<br>3.9<br>2.4<br>2.0<br>1.6 | 14.2<br>13.7<br>11.4<br>9.6<br>8.2<br>8.6<br>6.8<br>4.0<br>2.8<br>2.1 | 14.6<br>13.2<br>11.2<br>9.4<br>8.8<br>8.0<br>6.3<br>3.9<br>3.4<br>2.1 |
| 12) P. STUYVESANT  |           | LAURENS  | 1.1  | 1.1   | 1.1  | 1.1   | 1.1   |

| 1978  | 1979                                    | 1980   | 1981  | 1982   |
|-------|---|--|---|--|
|       |   |  |   |  |
| 94.2% | 94.5%                                   | 94.8%  | 95.2%   | 95.5%  |
| 5.8%  | 5.5%                                    | 5.2%   | 4.8%  | 4.5%   |
|       |   |  |   |  |
| 4.8%  | 7.5%                                    | 9.0%   | 10.9%   | 12.9%  |
| 18.5% | 17.8%                                   | 18.0%  | 18.2%   | 18.2%  |
| 76.7% | 74.7%                                   | 73.0%  | 70.9%   | 68.9%  |
|       |   |  |   |  |
| 37.5  | 38.6                                    | 40.7   | 41.6  | 44.1   |
| 50.8  | 50.3                                    | 49.1   | 49.0  | 47.3   |
| 11.7  | 11.1                                    | 10.2   | 9.4   | 8.6  |
|       | 94.2%<br>5.8%<br>4.8%<br>18.5%<br>76.7% | 94.2% 94.5% 5.5% 94.5% 5.5% 94.5% 7.5% 94.5% 74.7% 94.5% 94. | 94.2%       94.5%       94.8%         5.8%       5.5%       5.2%         4.8%       7.5%       9.0%         18.5%       17.8%       18.0%         76.7%       74.7%       73.0%         37.5       38.6       40.7         50.8       50.3       49.1 | 94.2%     94.5%     94.8%     95.2%       5.8%     5.5%     5.2%     4.8%       4.8%     7.5%     9.0%     10.9%       18.5%     17.8%     18.0%     18.2%       76.7%     74.7%     73.0%     70.9%       37.5     38.6     40.7     41.6       50.8     50.3     49.1     49.0 |